

CHIEF OPERATING OFFICER | CHIEF STRATEGY OFFICER

Transformation executive with proven expertise leading large-scale organizational change in complex global organizations. Recently completed comprehensive transformation of a major national philanthropy, delivering >30% cost reduction through strategic optimization while achieving record stakeholder satisfaction, and cultural revitalization. Experienced building for-profit and non-profit business units from scratch to scale, delivering measurable results for stakeholders and communities. Articulate communicator and collaborative leader, skilled at empowering teams, presenting to Fortune 500 boards, and fostering high-performance cultures. Thrives in environments that value diverse perspectives and principled leadership. Extensive operational experience across North America, EMEA, India, Hong Kong and Japan.

Strategic Transformation | Change Management | Corporate Strategy | Acquisition Integration
Cultural Revitalization | Portfolio Optimization | Global Operations

EXPERIENCE

Stand Together Foundation, USA

June 2023 – present

Vice President of Strategy, Arlington, VA | Atlanta, GA

Led comprehensive organizational transformation over two years, redesigning strategy, operations, structure, and culture to establish the Foundation as a leading platform for social entrepreneurship investment. Currently direct execution of new business model, managing all staff and resources dedicated to supporting 350+ nonprofits nationwide.

- **Strategic Transformation:** Architected and executed complete business model redesign, developing new vision, four-component strategy, and systematic investment approach that repositioned STF as the premier social entrepreneur development platform
- **Executive Team Restructuring:** Catalyzed an overhaul and streamlining of the leadership table, introducing leading talent and a new culture of focus, collaboration and accountability
- **Operational Excellence:** Delivered \$20M in projected programming savings over 5 years while achieving >30% headcount reduction and record-high partner satisfaction scores
- **Portfolio Optimization:** Led strategic realignment of entire program portfolio, discontinuing underperforming initiatives and transitioning legacy partnerships to focus exclusively on high-impact social entrepreneur development
- **Partnership Development:** Launched integrated marketplace of services and systematic investment discipline, transforming grant-focused transactional relationships into long-term strategic partnerships that provide ongoing value to catalyst organizations and unlock sustained investment potential
- **Culture Transformation:** Transformed organizational culture into high-performing, collaborative environment emphasizing staff empowerment, operational transparency, and career development; direct reports report feeling "never so empowered" (360 feedback), with former employees now returning to rejoin the organization

INVESCO LTD, USA / Germany

July 2004 – April 2023

Head of Investment Specialized Services, Atlanta, GA, August 2014 - April 2023

Founded and led Investment Specialized Services, a 125-person, multidisciplinary function in seven countries that delivers key capabilities and drives revenue growth opportunities. Provided strategic oversight to all aspects of the organization, including revenue targets, budget, hiring, multi-year strategies, and board representation.

- Developed and led firm's award-winning sustainable investing services, recruiting a global team of 31 professionals and delivering AUM growth of \$60B in 6 years across multiple products and geographies
- Built and led Invesco Indexing LLC, developing the subsidiary from concept to a recognized index provider managing over \$13B in associated assets through organic and inorganic growth, including BulletShares.
- Led the integration into Invesco of over 200 investment professionals managing \$276B in AUM through the acquisition of Guggenheim ETFs and Oppenheimer Funds.

Chief Administrative Officer, Administration, Atlanta, GA, June 2011–August 2014

Led C-suite-sponsored initiatives covering an array of topics, including location strategy to evaluate the firm's footprint, creating specific criteria for development of locations, and restructuring key geographies such as Invesco's London presence. Managed strategy, communications, financial reporting, and talent for administration, the firm's largest function.

- Guided enterprise center strategy to develop and expand operations and technology centers in Canada and India, increasing functional capabilities and growing headcount from 700 to more than 2000.
- Directed data strategy to transform the firm from a system-centric to a data-centric platform and culture, resulting in a major, multi-year conversion of the firm's primary back-office system.

Global Manager of Trading Development, Frankfurt, Germany, Atlanta, GA, November 2007–June 2011

Developed and introduced a global trading model that linked nine previously autonomous trading desks in countries into a single global function, improving best execution capabilities.

- Managed key external relationships with technology partners, research providers, and brokers.

Project Manager, Continental Europe, Frankfurt, Germany, July 2004 - November 2007

Spearheaded initiatives across Europe, which included divestiture of the company's custodian bank in Germany and subsequent transition of activities to third parties and other Invesco affiliates in the UK and Ireland.

- Built relationships, trust, and positive project outcomes by working in German with Frankfurt colleagues.

ADDITIONAL RELEVANT EXPERIENCE

CLARIANT GMBH, Frankfurt, Germany

Manager, Global Supply Chain and Process Management

STOCKAMP & ASSOCIATES, INC., San Francisco, CA, Houston, TX, Charlotte, NC

Associate Consultant

THE ADVISORY BOARD COMPANY, Washington, DC

National Systems Research Specialist

EDUCATION

International Master of Business Administration (IMBA), Moore School of Business, University of South Carolina, Columbia, SC

- Language specialization: German

Bachelor of Arts (BA), Political Science, *summa cum laude*, Furman University, Greenville, SC

- Concentration: Comparative Politics / US – Post-Soviet relations